Monday, February 17, 1986

Advertising Age®

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Last week's Tylenol poisoning poses another threat to Johnson & Johnson's best-selling pain reliever and raises questions as to the effectiveness of another campaign similar to the coupon ads used after the 1982 poisonings.

2-time loser

Ibuprofen to gain from Tylenol plight

An Advertising Age roundup

Cyanide most likely will not be the death of Johnson & Johnson's $525 million Tylenol brand, but the latest tampering incident probably will have more serious marketing repercussions than the first episode in 1982, when seven Chicagoans died after ingesting tainted Tylenol capsules.

Drug-industry analysts question whether J&J, burned twice, will continue marketing Tylenol capsules.

The discovery of cyanide in two bottles of Extra Strength Tylenol in a New York City suburb could not have come at a worse time for J&J. American Home Products' Advil, which contains ibuprofen, last month became the second biggest-selling pain reliever in the U.S. Analysts believe that, if marketed properly, Advil and Bristol-Myers' Nuprin can make further inroads on Tylenol's 34% share of the over-the-counter pain remedy market.

Tylenol, with 1985 sales of $525 million, still holds a considerable

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Ad-cost tax deduction may face cut of 20%

By STEVEN W. COLFORD

WASHINGTON—A multi-billion-dollar change in the federal tax treatment of advertising expenditures is on a list of revenue-raising ideas sent to the Senate finance committee by the Treasury Department.

The department list includes making only 80% of ad costs deductible from federal corporate income tax as a "business expense," instead of the current 100%.

Treasury officials would not elaborate on the proposal last week, although the department estimated the tax change would raise $20.6 billion in new corporate income taxes from advertisers over a five-year period. A Treasury official characterized the list as "options" that don't necessarily represent Reagan administration policy.

U.S. ad spending in 1986 is projected to exceed $109 billion for the first time, according to Robert Coen, senior vp-director of forecasting at McCann-Erickson, New York (AA, Dec. 16).

Congress and President Reagan are trying to agree on a formula that would balance new tax breaks with selected revenue-raising measures elsewhere.

The proposal caught ad-industry leaders by surprise.

"Ronald Reagan says there'll be no tax increase, but another way to have one is to change the [tax] situation so companies pay more in taxes," said Howard Bell, president of the American Advertising Federation. "This is a tax increase in another name."

At the Assn. of National Advertisers, senior vp Dan Jaffe said reducing tax deductions for advertisers would be "counterproductive because it's then likely that advertisers would spend less and there would be less sales, less tax revenue, slower job creation and [so on] down the line."

"If it's a serious consideration," Mr. Jaffe said, "business would be very opposed."

The proposed $20.6 billion revenue gain over five years is surpassed by only a few other options on the Treasury Department's list, such as a 10% disallowance of business interest deductions, a 10% disallowance for corporate interest deductions and changes in the business transfer tax.

By comparison, a 20% disallowance on corporate ad expenses could bring in nearly half as much as the much-discussed oil-import fee, according to Treasury Department calculations.

John Hatab, a tax partner at Price Waterhouse, New York, who

(Continued on Page 72)

Chiat, BBDO in shootout for U.S. Apple account

By CLEVELAND HORTON

Apple Computer has set up a showdown between longtime agency Chiat/Day and BBDO for the $50 million U.S. Apple account.

BBDO handles most of Apple's overseas advertising and has been reported to be wooing the company for the plum U.S. assignment for quite some time (AA, Aug. 5).

Cupertino, Cal.-based Apple said it is reevaluating its entire domestic marketing strategy.

The No. 2 personal computer marketer in the U.S. has asked Chiat and BBDO to submit detailed market strategies for "the foreseeable future" within 60 days, according to Bruce Mowery, advertising and sales promotion manager. He added, "This is not an open review. We are not soliciting any other agencies."

Chiat chairman Jay Chiat said he plans to meet with Apple chairman-ceo John Sculley Feb. 18. Mr. Chiat said Mr. Sculley expressed a "need to make sure he has [agency] people he can have confidence in" as Apple gears up for a new generation of product introductions. The outcome of that meeting may determine whether C/D will compete with BBDO for the account.

Apple will celebrate its 10th anniversary in 1987, and Mr. Sculley wants to position the company as being on "the crest of another revolution" in its advertising next year, Mr. Chiat said. Apple endured a wrenching reorganization in 1985 and has devoted

(Continued on Page 76)

Magazines cut rates, get multiyear deals

GM's '14 points' jab books

By JESSE SNYDER and EDWARD LAPHAM

General Motors' Media Council is wringing bigger ad discounts from many magazines while locking itself into multiyear contracts and promising more pages over the long haul.

But the GM media juggernaut, designed to pare costs for the auto maker, is meeting resistance from some quarters—most notably the *Wall Street Journal*.

"GM just wants control of the media," complained *Journal* vp-marketing Bernard Flanagan. "If GM succeeds in making print buying a commodity, it just cheapens editorial content of a medium and leads to its ultimate death for lack of content. It's counterproductive in the long run."

With relatively light GM business, the *Journal* has so far spurned the company's efforts to write new ground rules for media buying.

Not all publications are balking, however.

And GM's desire to entertain "multiyear proposals," one of its highly publicized "14 points" (AA, July 8), may be the balm that soothes the pain of rate cuts for some magazines.

Publishing "is a cyclical busi-

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Last Minute News

Air battle for Northwest's account

ST. PAUL, MINN.—Northwest Orient Airlines next month will stage a creative shootout between Grey Advertising, Minneapolis, and Dancer Fitzgerald Sample, New York. The winner gets "all or part of" the combined U.S. account for Northwest and Minneapolis-based Republic Airlines, pending approval of their merger (AA, Jan. 27). DFS now has Republic's $25 million account. Grey handles an estimated $35 million in Northwest business, a figure that the carrier expects will "increase significantly" this year. Colle & McVoy, Minneapolis, which handles Northwest's convention business and smaller accounts, wasn't invited to pitch.

Mysterious $35M account afloat on West Coast

LOS ANGELES—Several agencies here have received requests for proposals to take on an unspecified, $35 million retail account. Keye/Donna/Pearlstein, Needham Harper Worldwide and J. Walter Thompson USA are among those who have been contacted by consultant Jeff Rogers. The current agency will be notified this week that it is on probation, Mr. Rogers said, and will be allowed to pitch the account.

Claiborne Cosmetics talks to 12 agencies

NEW YORK—Liz Claiborne Cosmetics, the joint venture between Avon and sportswear marketer Liz Claiborne, is reviewing more than 12 agen-

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HIGHLIGHTS

Tax men eye ad deduction 1

A multi-billion-dollar change in the federal tax treatment of advertising expenditures is on a list of revenue-raising ideas sent to the Senate finance committee by the Treasury Department. The proposal would make only 80% of ad costs deductible from federal corporate income tax as a "business expense," instead of the current 100%.

GM council gets mixed reviews 1

General Motors' Media Council is wringing bigger ad discounts from many magazines while locking itself into multiyear contracts and promising more pages over the long haul. But the GM media juggernaut, designed to pare costs for the auto maker, is meeting resistance from some publishing quarters—most notably the *Wall Street Journal*.

Blowup in Baltimore 3

The stormy breakup of partners in Smith Burke & Azzam in Baltimore has spawned a lawsuit in which ousted exec vp Gene Azzam charges the agency with inflating client bills and using media money to improve cash flow. His former partners, in turn, accuse Mr. Azzam of trying to sully the agency's reputation and squeeze more severance pay from them

Humana-izing advertising 3

Humana Inc. next month becomes the first investor-owned multihospital system to launch a tv campaign designed to create a national brand image. But Humana's two closest competitors, Hospital Corp. of America and American Medical International, are preparing to embrace similar strategies as healthcare providers square off in an ever more competitive market.

Stroh tries 'value packs' 4

Stroh Brewery Co. is challenging traditional beer industry discount practices with 15-can and 30-can "value packs" for its Stroh's and Stroh Light brands. The move to value-added discounting will bow in a special March promotion tied to the brewer's participation in the Statue of Liberty-Ellis Island restoration project.

MCI loss prompts Ally questions 6

The loss of the MCI Communications account prompted widespread questioning about Ally & Gargano last week. Wall Street wondered why A&G was caught so much by surprise, while Madison Avenue asked whether the agency would be more open to being acquired.

'House Beautiful' redecorates 32

House Beautiful, the Hearst Magazines home and decorating monthly, targeted to the upper-middle of the market between, roughly, *Better Homes & Gardens* and *Architectural Digest*, is making more changes following a year of major shifts that included a new publisher, a new promotion campaign and a series of changes among the business staff.

Toys are plush 53

It was raining cats and dogs and bears last week at the Toy Fair in New York, where about 20% of

the toys introduced were plush animals. In the past, most stuffed animals have been generic. Now they are getting names, personalities and pedigrees.

CATEGORY REVIEW

Bear down, granola bars 4

The $438 million granola-bar market is in a crunch. Developed as a "healthy" alternative to candy a decade ago, granola bars showed enough early potential to interest General Mills, Quaker Oats, Ralston Purina, Hershey, Pillsbury and other major marketers. Yearly growth rates as high as 56% (in 1982) helped boost the category. But those days are gone.

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Production scramble abroad 42

Increasingly, ad agencies are scouring the world for inexpensive locations and other ways to save money shooting commercials. According to one agency executive, the pressure is coming from marketers who are unhappy with soaring production costs. Two different views on this subject: By Jack Hafferkamp and John O'Toole.

Agency exchange in Hong Kong 44

J. Walter Thompson Co. has hired the 10 ex-BBDO employes who staged a dramatic walkout from BBDO Hong Kong last year during a battle for local control of that agency.

Quebec to limit drinking ads? 44

The Canadian Radio-Television & Telecommunications Commission will decide this month whether to ban the use of celebrities in alcoholic-beverage commercials airing in Quebec. The proposed ban would include all celebrities, including sports figures.

OTHER NEWS

The partners of Fallon McElligott Rice in Minneapolis realized they were in a bind: They felt they had to expand internationally, but they were concerned about the risk even of expanding to New York or Los Angeles. The result was the sale of about 75% ownership of their 4½-year-old agency to Scali, McCabe, Sloves. Page 3.

Granola bars still have their champions, but some marketers are looking instead to the $194 million dried-fruit snack category. Fruit snacks are made from processed dried fruit pressed into bars or flattened on sheets of wax paper for tearing and eating. Dollar sales of fruit snacks hit $194 million in the first 10 months of 1985, up 28.5% compared with the previous year. Page 4.

The persistence of health-conscious consumers is beginning to pay off—both for them and for the marketers of lighter foods and beverages, sporting goods, self-diagnostic tests and a host of other products and services. A study by Langer Associates, New York, suggests the health trend is entering a second phase in which consumers have integrated new health habits and awareness into their life styles. Page 58.

Waterproof quality—in footwear and marinewear—is the umbrella theme behind Timberland Co.'s advertising from its new agency, SSC&B:Lintas Worldwide, New York. The U.S. campaign, themed "All the quality you may ever need," breaks in March issues of national consumer magazines, and will feature the company's footwear. Page 62.

The media-buying practices of major agencies came under attack last week from black media owners who contend that predominantly white advertisers and agencies shy away, sometimes intentionally, from advertising in black media. Page 71.

COMING THURSDAY

In 1971, a Yale University dropout, a Peace Corps volunteer bitten by the filmmaking bug, Tony Vanderwarker, poured himself into his first feature film: "Gross National Product," a black comedy about the Vietnam War. It was "an abysmally bad film," says Vanderwarker, who turns 43 years old March 6 and can look back at his brief filmmaking "career" from a different perspective. But it also was "a fantastic experience" and a "learning" one, he adds. A step on the way to exec vp-director of creative services at Needham Harper Worldwide's New York division, a post to which he was named last fall.

Skincare and treatment products to avoid signs of aging are hot spots in the toiletries & beauty aids industry. There's a product for virtually every wrinkle and every price point. Special Report will examine how packaging is affecting the industry, the popularity of knockoff fragrances, some leading marketers and the men's skincare category.

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Coke hoists flag for Classic

By NANCY GIGES

As Coca-Cola USA resumes the flag-waving for its old Coca-Cola Classic favorite, thereby positioning the brand above the Pepsi battle, its troubled new Coke has clearly inherited Classic's "slow down Pepsi" marketplace mission.

To further delineate the separate paths these brands are taking, the newest new Coke campaign—created by McCann-Erickson—has tv spots that pit the newer brand against rival Pepsi-Cola with leading-edge, stylized ads and the Pepsi-generation-type theme "Catch the wave." For Classic, once again settling into its flagship-brand role for the company, SSC&B:Lintas has created a patriotic, old-fashion creative platform

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Iacocca flap may slow drive

By JUDANN DAGNOLI

The ouster of Lee Iacocca from the chairmanship of the Statue of Liberty-Ellis Island Centennial Commission—just four months and $32 million away from a fund-raising goal of $265 million for the restoration of both symbols of American freedom—is expected to have a negative impact on that marketing effort.

Mr. Iacocca was removed by Donald Hodel, Secretary of the U.S. Department of Interior, from his post on the federal advisory commission because of a "perceived conflict of interest" with his chairmanship of the Statue of Liberty-Ellis Island Foundation, according to a

(Continued on Page 72)

West Coast news

Actor cops star role for PSA

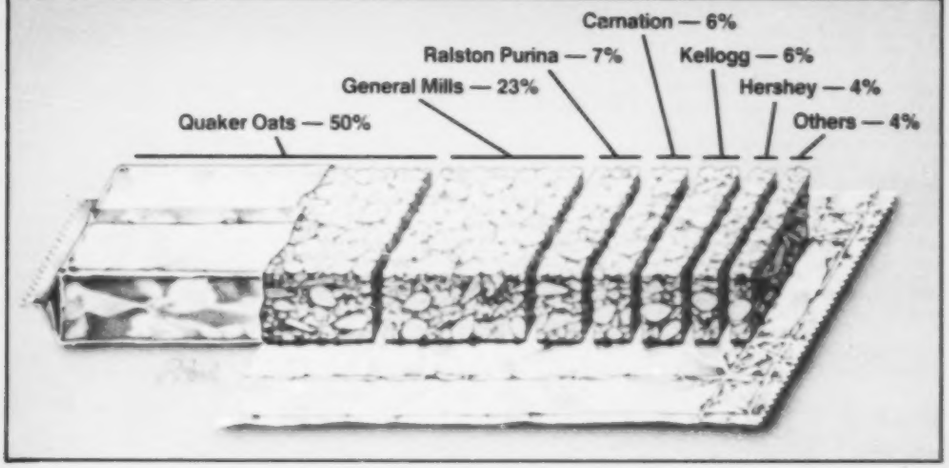
Pacific Southwest Airlines, San Diego, will use actor Ned Beatty as the central character in a series of commercials breaking Feb. 28 in 18 markets, primarily on the West Coast. Cast as a motorcycle policeman intent on catching speeders, Mr. Beatty eventually will pursue a PSA jet. Subsequent commercials will follow the humorous story line. The campaign is the first comprehensive campaign from Della Femina, Travisano & Partners, Los Angeles, which suc-

(Continued on Page 72)

CATEGORY REVIEW: WHOLESOME SNACKS

Granola bar market shares

General Mills and Quaker Oats Co. continue to dominate as other companies battle for their slivers of the $438 million granola bar market. Source: Selling Areas-Marketing Inc. Illustration by Paul Bond.



Dried-fruit snacks new hot market

MINNEAPOLIS—Granola bars still have their champions, but some marketers are looking instead to the $194 million dried-fruit snack category. Fruit snacks are made from processed dried fruit pressed into bars or flattened on sheets of wax paper.

General Mills, the granola-market pioneer, is one marketer that appears to be shifting its focus. Its 1985 granola-bar ad spending totaled only $7 million, compared with $15 million for fruit snacks. The company had no comment on its plans.

General Mills' Fruit Corners line already leads the fruit-snack category with an estimated 75% share, followed by Thomas J. Lipton Inc's Sunkist brand with 22% of the market. Private-label brands make up the remainder of the market.

Dollar sales of fruit snacks hit $194 million in the first 10 months of 1985, up 28.5% compared with the previous year, with yearend sales expected to be up more than 38%, according to Time Inc.'s Selling Areas-Marketing Inc. Sales climbed 33.6% to $151 million in 1984 compared with 1983, the segment's first year.

General Mills is testing new creative for its Fruit Corners Fruit

(Continued on Page 52)

Survivors fight for granola-bar market

By JULIE FRANZ

The $438 million granola-bar market is in a crunch.

Developed as a "healthy" alternative to candy a decade ago, granola bars showed enough early potential to interest General Mills, Quaker Oats, Ralston Purina, Hershey, Pillsbury and other major marketers. Yearly growth rates as high as 56% (in 1982) helped boost the category.

But those days are gone. The granola-bar category grew only 3.5% in dollar sales last year, compared with 1984, and many marketers who leaped into this category are now investing in the smaller but faster-growing dried-fruit snack category *(see related story above)*.

As the dust begins settling in a market that has been so volatile, analysts expect the days of jockeying for position are over. Quaker Oats and General Mills have found success and are expected to hold share. Carnation has flopped on two occasions, Pillsbury is expected to fold its hand by yearend and Ralston Purina is holding its own. Kellogg, which entered the market last year, shows promise, while candy makers Hershey Foods and M&M/Mars are hoping the magic returns.

The same factors that made the granola category explode a few years back have brought growth to a virtual halt, one agency source said. Granola is a grain-based mixture, most often made from wheat and oats, that may contain nuts, fruit, honey or brown sugar. But as granola-bar makers added sweet things for taste, the line between *granola* bars and *candy* bars began blurring.

Candy-bar marketers now are touting the wholesome aspects of their products ("Snickers satisfies you"), making it even harder to distinguish between the two product categories.

The market leader, Quaker Oats Co., Chicago, with a 50% share, wrested the leadership from General Mills, Minneapolis, in mid-'84. With its start in the market, Quaker added a new dimension to granola-bar advertising by emphasizing its product's taste ("Unexpectedly moist, chewy and delicious," ads said), leaving the "health food" moniker to General Mills' Nature Valley with its "100% natural" theme line.

Quaker followed its $20 million Chewy Granola Bar introduction in 1981 with flavor line extensions, such as peanut butter & chocolate chip and chunky nuts & raisins. Adding chocolate coating for its $24 million, late 1983, introduction of Granola Dipps and peanut butter coating for its $20 million June introduction of Peanut Butter Whipps helped keep the Quaker brand on top.

Backer & Spielvogel Chicago, formerly Quaker's in-house agency, AdCom, handles Chewy Granola Bars while J. Walter Thompson USA, Chicago, handles Whipps and Dipps.

General Mills' market share continues to drop, falling to a 23% share of the market, down from 28% in 1984, as the company shifts ad dollars to the faster growing fruit-snacks segment.

General Mills is keeping itself alive in granola bars with its recent introduction of Nature Valley Boppers. Much of the $25 million introductory ad budget is going to coupon redemption while the remainder is slated for network tv and print, themed "gone Boppers," via Needham Harper Worldwide, Chicago.

The company introduced its chocolate entry, the Dandy bar, early last year. Campbell-Mithun, Minneapolis, handles.

To solidify its lead, Quaker has moved to heavy price discounting and more advertising. On Jan. 26 Quaker Oats dropped a couponed freestanding newspaper insert for its Whipps and Dipps brands offering a free box of either with a purchase of two boxes. The company also is promising retailers strong national tv support, retail grocery buyers say.

Quaker's over-all ad spending hit $20 million in 1985, up from $19 million in 1984, industry sources say.

But candy-bar marketers have made inroads into the granola-bar

(Continued on Page 52)

Stroh challenges usual discounts

By RAYMOND SERAFIN

DETROIT—Stroh Brewery Co. is challenging traditional beer industry discount practices with 15-can and 30-can "value packs" for its Stroh's and Stroh Light brands.

The move to value-added discounting, rather than cents-off promotions, will bow in a special March promotion tied to the brewer's participation in the Statue of Liberty-Ellis Island restoration project.

The 15-pack will be distributed in place of the 12-pack in western markets, while a 30-pack will be offered in place of a 24-can case in the rest of the country.

The offer is scheduled only for March but is likely to return before the end of 1986, said Ray Gross, director-marketing development.

Point-of-purchase displays for the promotion, via Flair Communications, Chicago, will announce that Stroh will make a contribution to the Statue of Liberty-Ellis Island Foundation for every pack sold. Stroh's contribution will be 10¢ per pack.

Meanwhile, Stroh's third annual Run for Liberty—held during October the first two years—has been moved up to June 28 to take advantage of the hoopla expected to surround the July 4 dedication of the refurbished statue.

Last year's run, with 120,000 entries, raised $300,000 for the restoration fund. Mr. Gross said this year's run will be held in 110 cities (down from 127), but he expects a better over-all turnout because of better weather and publicity accompanying the July 4 festivities.

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The production scramble

Shops making spots abroad

By JACK HAFFERKAMP

Last year, producers at J. Walter Thompson Co. shot a tv spot for Kraft Miracle Whip salad dressing in which a farmer, coming home for lunch after a hot morning in the field, discovered his wife was out of Miracle Whip.

The key scene in the spot is the farmer searching across acres of lush farmland for a neighbor who will lend him his favorite sandwich spread.

But the agency's problem was the lack of production facilities near most U.S. farmland, and the prohibitive expense involved in shipping a production crew and equipment long distances.

As a solution, the spot's director, David Ashwell, an Englishman, suggested London as a location, and JWT discovered it could save 15% to 20% of costs by producing the spot in the U.K.

Increasingly, advertising agencies are scouring the world for inexpensive locations and other ways to save money shooting commercials. According to one agency executive, the pressure is coming from marketers who are unhappy with soaring production costs.

A recent Assn. of National Advertisers study of 15 major companies, four ad agencies and three consultants found that from 1979 to 1984 production costs rose twice as fast as the consumer price index. Among the reasons were increased costs for special effects, preparation costs (up 113%), set construction costs (up 185%), talent costs (up 132%) and props and wardrobe (up 232%).

"The over-all economic difference [of overseas production] is certainly worthwhile, particularly on a really big job," said Barney Melsky, president of New York's Melsky Zander Films.

Although agency execs were reluctant to cite specific figures, they all agreed that shooting overseas can result in substantial savings on crew costs, special effects, sets, props and talent.

Agencies are shooting spots in Canada, France and Spain, but London appears to be the favorite. That's partly because of British directors with a reputation for superior work, such as Ridley Scott, who directed Apple Computer's acclaimed "1984" spot for Chiat/Day.

John Cigarini, president of BFCS, one of Britain's top film production houses, said British directors are held in high esteem because many of them also do feature film work.

He said directors and other members of the film community turned to commercials during the 1970s when the British feature film industry was suffering a decline and fewer films were being produced.

"Consequently, the studios and the construction people and the art departments in England are more geared toward commercials than they are in America," he said.

He also said British directors are different from U.S. directors because the former have more input on commercial projects.

According to Mr. Cigarini, directors in the U.K. have "total involvement in a project, from location scouting, to the casting, to the editing. It's seeing a film all the way through. From all reports I [have] heard, this is something the American agencies had not been receiving from the American directors."

Strength of dollar plays major role

In recent years, the strength of the U.S. dollar versus foreign currencies has also played a major part in making foreign production more attractive.

Even now, as the dollar declines, a comfortable edge remains, according to Martin Levin, a producer at JWT in Chicago who has worked in the U.K. He speculates that the advantage will remain as long as the dollar stays under $2 per pound sterling. In early February, the exchange rate was $1.39 for one pound sterling.

However, it appears that even if the dollar-to-pound exchange rate differential were to evaporate completely, the awareness of foreign production as a creative and economic consideration is not likely to disappear. It is now a basic part of the production formula at top agencies. And while it may not be the primary factor in their considerations, it is certainly on clients' minds, too.

For example, Dennis Byron, director of marketing communications for Data General, describes his thinking this way:

"The determining factor is what you want the ad to accomplish. You can't say, 'I'm going to shoot in central Europe or the Far East,' and then see what they have to offer. You do it the other way around."

According to one source, a client last year asked one of its agencies to look into shooting a commercial outside the U.S., and the agency found that hundreds of thousands of dollars could be saved if the spot were shot overseas. The commercial was shot in the U.S., however, when the client put the agency under a rigid time limit, the source said.

What was astonishing, according to the source, is that production houses outside the U.S. quoted a significantly lower figure for the job even though the director and other elements of the shoot remained unchanged.

According to Mr. Melsky, agencies now must "take a global look at buying, and buy the best, most efficient production wherever they can find it."

Tv spot costs

Minimum cost of a three-day shoot for a 30-second commercial for a nationally-advertised brand, using 3 actors, a well-known director, indoor shots and no special effects. Source: Advertising Age.

Country	Cost (US$)
United States	100,000
Netherlands	90,000
United Kingdom	70,000
Canada	50,000
Spain	50,000

U.S. production crews are becoming a common sight in London.

U.K. has best value for dollar

By JOHN O'TOOLE

What does an Organization of Petroleum Exporting Countries ministers' meeting have to do with where a New York agency shoots a commercial?

Well, try to follow this: OPEC decisions in December effectively lowered the world price of oil; this reduced the U.K.'s expected income from its North Sea wells; that caused the British pound, which had been reviving since September, to lag again; that made a production job bid in pounds even more attractive than it was the previous week.

Such considerations increasingly occupy the minds of agency producers whose previous concerns about currency fluctuations ended at the price of Gucci loafers. But with clients no longer concealing their outrage at $250,000 bids for 30-second commercials, and with megamergers threatening in-house consolidation of production as well as media buying, agency producers are turning to overseas shooting to convince clients that they are, after all, budget-conscious. And last year they found some real bargains, thanks to the continued strength of the dollar.

It would, they point out, be false economy if the talent were not there to insure a quality product. But if the popularity of British directors such as Barry Meyers and Howard Guard is any indication of foreign proficiency behind the camera, it's there in abundance.

Phil Dusenberry of BBDO, in fact, claims that the genius of certain directors and not the feebleness of the pound attracts him to London studios. He even shot a Pepsi commercial there with director Ridley Scott that had to do with an American space ship launch.

While they can get the quality they seek on film working elsewhere, most producers opt to finish back home. The sophisticated equipment and technical talent required for computerized editing on videotape is, for the moment, in America.

This, however, is where the savings from shooting overseas can be wiped out. Some sophisticated technical equipment commands rental charges of up to $800 an hour.

But for the alert producer, overseas filming can bring many commercials in substantially below what they would cost in the U.S. One obvious area of saving is on-camera talent costs, a topic that sends blood pressures soaring at the headquarters of the Screen Actors Guild.

The union now has reciprocity with its counterpart in the U.K. and insists there be a "legitimate reason" for using non-SAG performers in other foreign productions. Nevertheless, one can honor their rules and still save plenty by "buying out" the talent with a single payment in lieu of residuals and by avoiding the overscale rates that are becoming all too common in the U.S.

British crews eliminate 'golden time'

Several American producers claim that a more cooperative attitude about the clock on the part of European crews also results in savings. Stretching the normal working day a bit under abnormal circumstances can obviate "golden time" or an additional day of shooting.

Another potential saving is in director's fees. These have soared in recent years, particularly among the "name" directors who charge $10,000 to $15,000 per shooting day and half that for a day of preparation.

Will they work for less in the U.K. and Europe? "Of course they will," says Barry Day of McCann-Erickson. American directors want to establish themselves in the growing centers of commercial production outside the U.S. and British directors enjoy the London tradition whereby they run the show with little interference from the agency producer.

But the most substantial saving results from the powerful U.S. dollar. Just as it makes clothing and shoes less expensive than they were three years ago in Europe, it makes raw film stock and stage rentals and wardrobes less expensive. Wages for electricians and cameramen and grips are calculated in currencies that translate into fewer dollars.

And despite the moderate success leading Western governments achieved in taming the dollar recently, smart shoppers can find a bargain, whether it's in Burberry raincoats or 30-second tv commercials. One New York producer told me she could bring a London production in well under the bid from a U.S. production house for the same commercial even after adding $20,000 in travel and living expenses for agency and client personnel.

The most popular countries for bargain filming just happen to be among the most popular for bargain vacationing. There's England, offering a variety of the "hot" directors. There's France with the scenic Paris locations. There's Italy where the superb facilities of Cinecitta Studios are located and there's Spain where the technicians who produced Sergio Leone's "spaghetti westerns" work along the Mediterranean coast.

And therein lies the problem. As Ogilvy & Mather's Jay Schulberg points out, no matter how much the agency is saving the client by filming overseas, there's no way to recommend a trip to London, Paris, Rome or the Costa del Sol without being accused of boondoggling.

Mr. O'Toole, former chairman of Foote, Cone & Belding Communications, New York, writes a monthly column on creativity for the International section of Advertising Age.

Granola

(Continued from Page 4)

market—a market they consider a natural extension of candy—with products of their own.

Hershey, Pa.-based Hershey Foods was the first traditional candy maker to get into the granola action with its 1983 introduction of New Trail bars. Hershey New Trail bars have made little headway, despite the product's acclaimed campaign via Ogilvy & Mather, New York, which features children doo-wopping to '50s and '60s music that describes the product's taste.

To bolster sales, Hershey added chocolate-covered granola to its New Trail line of granola bars in January. It will be offered in three flavors: Honey graham, peanut butter and cocoa creme.

Hackettstown, N.J.-based candy giant M&M/Mars in April will introduce Kudos, a milk-chocolate covered granola bar, in Northeast markets after denying rumors of such a move for more than a year. The product comes in three flavors: Nutty fudge, peanut butter and chocolate chip.

Ad support, probably breaking this summer, calls for tv and magazines, via Ted Bates Advertising/-New York.

Rather than going head-to-head with granola-bar makers, M&M/-Mars said Kudos should broaden its interest in the snack category since research shows growing interest among consumers for high-quality snacks. Chocolate lovers eat both chocolate and chocolate-covered granola, Mars has found. "They eat both, and a lot of it," said a company spokesman.

Rounding out the granola-bar segment, Ralston Purina, St. Louis, holds the No. 3 spot with a 7% share, followed by Los Angeles-based Carnation's Breakfast Bars with 6%, Kellogg Co.'s Rice Krispies Bars with 5% and Hershey's New Trail with 4% (down from 7% in 1984).

Ralston has been leaning heavily on its S'Mores Granola Bars' campfire tradition in $5 million in print ads via MCA Advertising, New York. The impact of the mid-'84 introduction was diluted when Quaker quickly introduced a S'mores flavor of its Chewy granola bars. The Quaker product received newspaper couponing and tv spots separate from the brand's over-all campaign.

Carnation Breakfast Bars, on the market since 1975, are a vitamin-fortified product that, combined with a glass of milk, offer a well balanced meal, the company says. SSC&B, New York, handles the estimated $2 million account.

Carnation had made two other ill-fated forays into the category, first with Good & Chewy Bars, which tested in 1984 but "never got off the ground," the company said. Carnation Trail Mix Bars bowed in 1982 but were discontinued in 1983 after a reformulation failed to revive sales.

Battle Creek, Mich.-based Kellogg entered the fray with its Rice Krispies Bars in April. Kellogg has forged inroads in its initial eastern and southern introductory markets as the product moves national, sources say. Rice Krispies Bars has grabbed as high as a 20% share in some of its markets with an average of a 13% among all its markets, Kellogg says.

Network tv and couponing, via Leo Burnett USA, Chicago, which broke nationally in mid-September, stress the unique taste and texture of the three-flavor line of bars made with Kellogg's Rice Krispies cereal. The product's theme line, "Kellogg's Rice Krispies cereal provides the crispy and the oats and honey provide the chewy," leans heavily on reputation of its No. 4-selling cereal.

Minneapolis-based Pillsbury's Milk Break Bars, introduced in April, 1984, aren't selling enough to register on data tracked by Time Inc.'s Selling Areas-Marketing Inc. The company has dropped advertising support and dumped two of its four flavors, Pillsbury said. Ketchum Advertising/San Francisco, handled.#

Also contributing to this story was AA New York reporter Patricia Winters.

Dried fruit

(Continued from Page 4)

Roll-Ups in West Coast markets, looking to head off possible encroachment by Lipton or any new entries. A new spot from Needham Harper Worldwide, Chicago, sticks to the product's "fun" theme, featuring a school bus full of monkeys dressed as children. It shows the monkeys ripping apart packages of Fruit Roll-Ups, playing with them and, of course, eating them. Sources say General Mills plans to begin running the spot nationally during the first quarter. Previous spots for the product featured children in similar situations.

Creative for General Mills' Fruit Corners Fruit Bars exploits the fact the product is both "good and ugly." Needham also handles.

General Mills' share in this segment has been growing at the expense of Lipton. But that trend was halted by Lipton's introduction last summer of Sunkist Fun Fruits, a pellet-shape fruit product that has helped expand the company's franchise and the category without taking share from General Mills, industry analysts say.

The four-flavor Fun Fruits line is targeted more toward children—the market's high-growth segment—than Lipton's first product, Sunkist Fruit Rolls. Fun Fruits' theme line, "Every chewy one is real fruit fun," echoes General Mills' Fruit Corners Fruit Roll-Ups theme, "Real fruit and fun rolled up in one." Foote, Cone & Belding, New York, handles Sunkist.

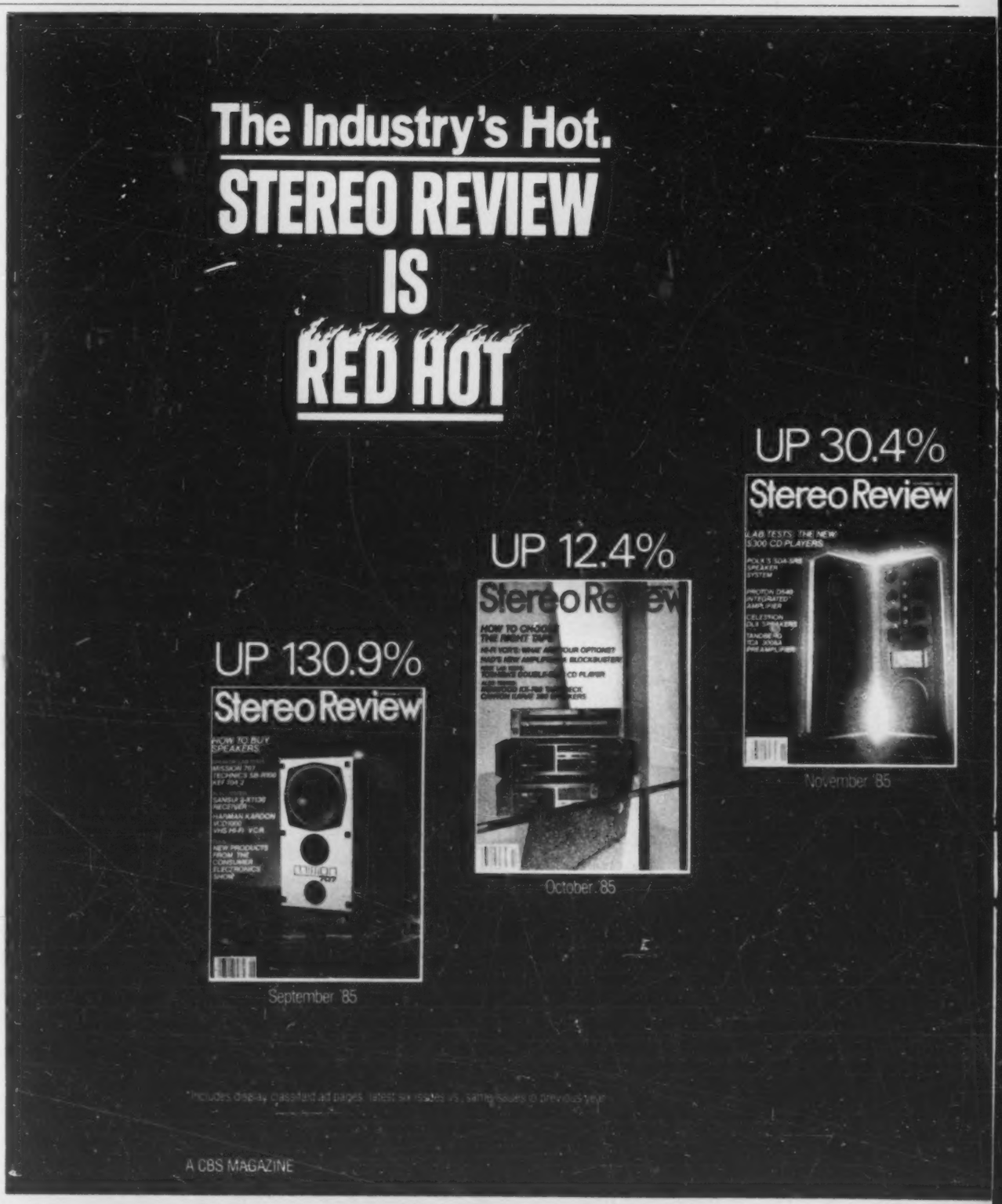
Englewood Cliffs, N.J.-based Lipton entered the market in 1980 by acquiring Chicago-based Flavor Tree Inc. Lipton still sells Flavor Tree's single-serving fruit snacks through grocery stores. Rumrill-Hoyt, New York, handles.

Lipton's first entry under its Sunkist label was Fruit Rolls, introduced in 1983. Tv and print, themed "Have you heard your fruit today?" features noises made when the fruit is ripped from its paper wrapper.

Rapid sales growth in the fruit-snack segment should attract new entries to the market, sparking yet another spurt of sales, one source said. The high cost of entry may hold back new brands, however. Other snack makers (such as Quaker Oats) or other fruit-product marketers (such as General Food's Jell-O or Castle & Cooke's Dole) are most likely to take a stab at the market, the source added.

Experts question the long-term growth potential of fruit snacks. Because the product is targeted primarily to children, its market size is smaller than that for granola bars, aimed at all ages.

Sales volume will begin slowing at $200 million and will peak at $250 million, said Alan Miller, SAMI vp-sales service. Growth is potentially greater, but rests on the popularity of dried fruit sold in grocery and health-food stores. Raisins, the most popular dried fruit, have had three good drying seasons. A crop failure would "shove fruit-bar sales through the roof," Mr. Miller said.#



Consumer Magazine Ad Linage

Advertising pages for U.S., Canadian and foreign consumer publications

January

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
— Art & antiques —				
Art in America	—	—	—	—
Southwest Art	59.5	74.3	115.7	143.8
Total Group	59.5	74.3	115.7	143.8
% change	-20%		-19.5%	
— Auto/cycle/rec. vehicles —				
AutoWeek (52X)	—	—	—	—
Car & Driver	80.4	82.4	198.2	193.0
Car Collector & Car Classics	14.4	22.0	28.0	43.0
Car Craft	59.6	50.7	106.6	97.6
Circle Track	62.8	40.1	102.5	73.3
Cycle	36.6	35.4	65.3	67.7
Cycle Guide (11X)	21.4	21.2	21.4	21.2
Cycle World	39.9	34.2	77.6	73.3
Dirt Rider	22.7	19.7	57.7	56.5
Dune Buggies & Hot VWs	83.9	79.7	163.6	155.8
Family Motor Coaching	136.3	135.1	314.0	311.8
4 Wheel & Off-Road	71.9	65.2	138.1	119.4
Four Wheeler	76.2	81.1	150.7	151.4
Hot Rod	57.3	49.1	95.0	80.9
Motorcyclist	40.9	24.4	66.0	41.3
Motor Trend	69.5	61.5	123.7	113.4
Motorhome Life	91.6	81.9	176.5	176.6
Rider	43.3	32.3	72.5	65.6
Road & Track	80.8	86.6	159.2	182.9
3 Wheeling	56.7	49.0	105.7	95.6
Trailer Life	113.0	111.8	214.5	219.6
Total Group	1,259.3	1,162.4	2,436.8	2,339.9
% change	+8.3%		+4.1%	
— Boating & yachting —				
Boating	166.8	163.2	328.8	309.0
Chesapeake Bay	39.5	30.0	69.5	56.1
Lakeland Boating (10X)	64.5	65.5	124.0	126.2
Motor Boating & Sailing	233.5	233.7	466.4	448.7
Sail	118.7	157.9	222.5	276.5
Small Boat Journal (6X)	53.1	42.0	—	—
Trailer Boats (11X)	46.9	36.0	87.6	65.5
Western Boatman (6X)	—	—	54.7	54.1
Yachting	135.5	173.1	326.4	389.5
Total Group	858.5	901.4	1,679.9	1,725.6
% change	-4.0%		-2.8%	
— Canadian —				
L'Actualite	89.0	38.8	104.3	66.0
Chatelaine:				
English Edition A.	97.9	92.1	159.3	152.9
French Edition	85.0	81.0	136.1	124.5
Financial Post A.	39.9	26.8	71.0	56.8
Flare A.	43.4	50.5	70.9	87.9
Homemaker's (10X)	—	—	—	—
Madam Au Foyer (10X)	—	—	—	—
Maclean's (52X) A.	103.8	128.4	202.0	202.7
Reader's Digest:				
Canadian-English A.	72.2	64.3	139.6	121.0
Canadian-French A.	53.5	53.0	108.5	94.0
Toronto Life	79.1	52.5	140.5	107.4
Vancouver	51.2	53.0	94.2	97.7
Total Group	715.0	640.4	1,226.4	1,110.9
% change	+11.6%		+10.4%	
— Civic/fraternal —				
American Legion	30.4	36.3	59.2	65.0
Elks (10X)	22.0	25.8	42.1	51.3
Kiwanis	23.1	14.5	40.0	28.1
Lion (10X)	6.0	4.8	13.3	11.5
Rotarian	10.5	13.5	21.5	27.1
V.F.W. (11X)	31.8	29.0	61.9	52.9
Total Group	123.8	123.9	238.0	235.9
% change	-0.1%		+0.9%	
— Comics —				
DC Comics	5.0	6.5	12.0	15.5
Marvel Comics Group	6.0	6.0	13.0	10.5
Total Group	11.0	12.5	25.0	26.0
% change	-12.0%		-3.8%	
— General —				
The Atlantic A.	25.9	36.6	65.2	73.3
Bon Appetit A.	89.5	90.3	146.5	146.5
Changing Times	49.2	33.4	99.4	68.8
Connoisseur	41.1	37.7	86.4	79.8
Consumer's Digest (8X)	25.2	45.6	25.2	45.6
Ebony	107.1	93.3	177.6	157.2
Fifty Plus	37.5	35.2	78.4	69.5
Food & Wine	45.7	40.4	78.9	74.3
Gamut	18.3	18.9	40.8	35.8
Gourmet	—	—	—	—
Harper's Magazine A.	22.2	23.6	45.7	50.0
Life	36.7	38.5	105.3	116.3
Modern Maturity (6X)	41.5	50.1	41.5	50.0
Money	106.7	109.2	204.9	204.6
Moneysworth (4X)	10.0	13.8	10.0	13.8
Mother Earth News (6X)	53.3	53.0	53.3	53.0
Mother Jones (9X)	19.7	16.7	41.9	29.0
National Geographic	16.9	22.5	36.1	37.3
Natural History	47.6	39.1	98.6	82.3
Prevention	67.8	66.8	127.4	131.4
Psychology Today	22.6	27.7	42.0	54.5
Saturday Evening Post (9X)	37.7	30.7	—	—
Signature	53.2	59.2	105.1	98.3
Smithsonian	64.8	87.6	150.6	155.6
Success	60.2	53.1	—	—
Sylvia Porter's Personal Finance (10X)	55.0	—	55.0	—
Town & Country	103.7	115.1	190.1	202.0
Travel-Holiday	42.8	46.0	77.3	83.3
Travel & Leisure	108.7	124.6	195.4	183.9
Vanity Fair	39.8	27.3	76.8	55.5
Writers Digest	22.2	21.2	41.8	44.7
Total Group	1,435.1	1,422.0	2,562.1	2,423.6
% change	+0.1%		+5.0%	
— Home —				
Americana (6X)	32.9	40.3	32.9	40.3
Architectural Digest A.	81.2	107.8	184.6	183.5
Better Homes & Gardens	106.2	105.5	169.5	170.9
Colonial Homes (6X)	—	—	52.4	46.1
Country Home (6X)	38.5	30.6	—	—
Country Journal	30.9	30.3	50.7	67.2
Country Living	66.8	63.1	128.7	120.4
Dallas/Ft. Worth Home & Garden	59.9	53.7	142.2	108.4
Family Handyman (10X) A.	58.1	54.0	115.9	115.6
Flower & Garden (6X)	53.6	47.3	—	—
Home	60.0	55.0	92.7	97.8
The Homeowner (10X)	35.2	32.5	35.2	32.5
Horticulture	35.5	30.4	89.0	74.3
House Beautiful	54.0	58.4	109.2	116.8
House & Garden	84.8	83.0	145.9	150.9
Houston Home/Garden	82.3	82.3	136.3	155.3
Metropolitan Home	50.8	80.6	83.1	119.0
New Shelter (9X)	73.3	74.3	116.8	126.0
1,001 Home Ideas	44.9	44.0	78.7	69.8
Phoenix Home/Garden	88.0	67.5	144.0	130.0
Rodale's Organic Gardening	76.6	70.5	153.3	140.2
Rx Being Well	24.0	20.0	46.0	—
San Diego Home/Garden	57.5	63.7	130.5	120.7
South Florida Home/Garden	30.3	32.8	59.5	66.0
Southern Accents (6X)	—	—	107.8	74.4
Southern Living	109.4	110.0	204.8	190.0
Sunset Magazine A.	125.5	124.4	221.5	208.6
Texas Homes	57.9	59.3	140.9	153.5
Workbench (6X)	—	—	51.2	56.8
Total Group	1,582.9	1,568.8	3,061.8	3,035.2
% change	+1.0%		+1.0%	
— In-flight & other passenger —				
Aboard Group (6X)	—	—	—	—
Alaska Airlines	43.6	45.3	101.8	83.9
American Way (26X)	87.3	110.2	179.4	195.2
East/West Network:				
Eastern Review	109.7	106.5	199.5	190.7
Frontier	38.0	27.2	77.5	53.5
Northwest Orient	46.2	35.2	91.4	69.3
Ozark	42.7	30.2	89.2	64.5
PSA Magazine	96.8	68.3	185.3	134.3
Pan Am Clipper	52.7	48.7	102.9	103.7
Republic Scene	43.5	36.0	90.1	79.2
Spirit	93.2	70.7	178.7	162.2
United	81.5	75.7	167.1	154.4
Western's World	66.5	46.7	130.3	91.0
Halsey Publications:				
Air Cal	—	—	—	—
Delta Sky	—	—	—	—
Frontier	—	—	—	—
Skylite	—	—	—	—
Hawaii (6X)	20.8	23.8	41.7	47.5
Pace	91.6	29.8	151.3	82.8
Presidential Airways (24X)	11.2	—	11.2	—
Southwest Airlines	—	—	—	—
Spirit of Aloha (6X)	20.3	23.7	40.7	47.3
TWA Ambassador	37.5	40.0	78.8	79.0
Total Group	983.1	818.0	1,916.6	1,638.5
% change	+20.2%		+17.0%	
— Men's —				
Esquire	—	—	—	—
Firehouse Magazine (13X)	30.4	32.6	72.7	75.5
Gentlemen's Quarterly A.	124.0	107.8	180.8	166.3
M	55.8	52.8	82.0	80.8
Penthouse A.	30.3	30.5	76.6	82.4
Playboy A.	42.0	51.5	114.5	145.4
Total Group	282.5	275.2	526.6	550.4
% change	+2.7%		-4.3%	
— Metropolitan —				
Aloha (6X)	—	—	—	—
Atlanta	43.0	35.6	89.9	86.2
Baltimore	70.1	82.2	126.5	140.7
Boston	—	—	—	—
California	43.7	67.9	143.4	123.7
Charlotte (10X)	—	—	—	—
Chicago	110.3	101.6	193.1	198.9
Chicago's North Shore	58.5	68.4	136.3	149.5
Cincinnati	56.2	55.7	109.1	112.1
Cleveland	57.2	100.4	117.5	174.6
Coast (38X)	—	—	—	—
Columbus Monthly	48.1	47.4	98.3	123.0
Commonwealth	—	—	—	—
Connecticut	86.4	70.6	169.8	143.5
Mid Atlantic Country	30.3	37.5	54.8	66.3
D/Magazine, Dallas/Ft. Worth	111.5	98.4	223.5	214.4
Denver	45.0	34.7	77.2	32.2
Grand Rapids	26.3	33.3	92.5	69.3
Gulfshore Life (10X)	—	—	—	—
Honolulu	49.9	58.5	108.4	137.6
Houston City	50.0	48.6	90.7	120.6
Indianapolis	33.8	29.5	83.1	74.8
Kansas City	—	—	—	—
Los Angeles	139.7	141.5	266.0	285.0
Louisiana Life (6X)	—	—	39.0	55.6
Madison	66.0	44.0	126.0	124.0
Metropolitan Detroit	67.0	51.0	194.5	127.5
Miami Mensual	46.3	40.8	98.1	84.3
Miami/South Florida	63.1	85.5	152.1	185.1
Milwaukee	53.3	64.9	100.5	119.3
Minneapolis/St. Paul	—	—	—	—
Monthly Detroit	59.8	35.8	204.4	86.8
Nashville	36.0	27.0	87.0	55.0
New England Monthly	24.9	13.3	68.1	53.1
New Jersey Monthly	81.6	56.0	144.5	110.8
New Mexico	14.5	35.2	57.4	93.7
Ohio	38.7	52.5	99.3	105.3
Oregon	20.5	30.4	35.0	48.5
Orlando	102.7	90.3	200.2	188.3
Palm Beach Life	101.5	122.3	195.5	240.4
Palm Springs Life	143.8	132.2	300.3	305.7
Philadelphia	114.2	128.2	227.5	230.2
Phoenix	86.1	118.9	189.6	236.1
Pittsburgh	55.6	49.2	93.7	97.9
St. Louis	—	—	—	—
San Diego	135.8	124.8	261.8	288.6
San Francisco (6X)	—	—	—	—
San Francisco Focus	77.2	70.7	143.5	145.4
Texas Monthly	84.0	86.0	278.5	177.7
Twin Cities	36.4	38.6	76.3	94.9
Ultra	49.8	63.2	93.0	116.9
The Virginian (6X)	—	—	58.5	58.0
Washington	—	—	62.0	24.0
Washington Dossier (11X)	36.0	41.7	82.5	107.8
The Washingtonian	141.8	145.0	253.0	292.0
Total Group	2,796.6	2,731.1	6,101.9	6,102.3
% change	+2.4%		-0%	
— Movie/romance/radio/tv —				
Macfadden's Women's Group:				
Modern Romances	25.3	20.5	37.0	37.1
Secrets	25.3	20.5	37.0	37.1
True Confessions	25.3	20.5	37.0	37.1
True Experience	25.3	20.5	37.0	37.1
True Love	25.3	20.5	37.0	37.1
True Romance	25.3	20.5	37.0	37.1
Sterling Women's Group:				
Daytime TV	25.8	28.5	49.6	57.0
Modern Screen	15.5	12.0	15.5	12.0
Movie Mirror (6X)	15.5	20.5	15.5	20.5
Soap Opera Stars	15.8	17.5	16.8	17.5
TV Movie Screen (6X)	8.3	6.0	8.3	6.0
TV Picture Life (6X)	4.3	6.0	4.3	6.0
Total Group	238.0	213.5	332.0	341.6
% change	+11.5%		-3.0%	
— Music/entertainment —				
American Film (10X)	—	—	—	—
Audio	59.6	68.9	154.7	173.9
Circus Magazine	28.3	47.3	62.6	92.3
Dance Magazine	54.6	57.6	108.5	113.7
Musician	—	—	—	—
Playbill	51.0	48.8	89.5	92.4
Record	—	—	—	—
Stereo Review	97.3	34.9	155.9	82.1
Video	73.9	78.0	160.3	156.2
Video Review	57.0	52.0	121.0	116.0
Total Group	421.7	387.5	852.5	826.6
% change	+8.9%		+3.1%	
— National Sunday magazines —				
USA Weekend (52X)	—	—	—	—
Parade (52X)	49.6	45.8	96.4	92.9
Total Group	125.6	135.4	244.9	287.2
% change	-7.2%		-14.7%	
— Outdoor & sport —				
Alaska	55.4	54.6	91.3	95.5
The American Handgunner (6X)	35.0	33.0	35.0	33.0
American Hunter	16.6	19.9	38.6	35.1
American Rifleman	16.0	24.3	44.2	51.0
Backpacker (6X)	—	—	23.1	25.3
Bass Master (9X) A.	91.6	80.1	142.0	127.5
Bicycling (9X)	48.4	—	108.5	80.7
Ducks Unlimited	—	—	20.5	28.8
Equus	40.2	48.9	94.0	101.3
Field & Stream	94.3	90.6	156.7	146.4
Fins & Feathers A.	—	—	—	—
Fishing World	—	—	—	—
Florida Sportsman	155.1	152.5	265.1	242.3
Flying	36.5	38.7	70.7	78.6
Fur-Fish-Game	—	—	—	—
Golf Digest	131.3	129.7	228.9	237.1
Golf Magazine	130.6	117.0	265.9	254.5
Gun Dog	—	—	25.9	21.7
Guns	28.0	22.0	57.0	43.0
Guns & Ammo	36.7	39.5	95.3	75.3
In-Fisherman (6X)	63.0	48.0	63.0	48.0
Muscle & Fitness	110.3	110.0	217.6	214.3
Outdoor Life	86.7	90.0	149.2	133.2
Outside Magazine	35.9	29.6	66.3	58.2
Petersen's Hunting	31.7	32.9	90.1	62.1
The Runner	24.7	26.5	50.5	53.5
Runner's World (13X)	25.4	31.1	53.6	64.1

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. * All affiliated with Sunday Mag/Net. except Los Angeles Times Home Magazine and New York Times Magazine.

(Continued on Page 62)

(Continued from Page 61)

January

	Current month 1986	1985	Year-to-date 1986	1985
Salt Water Sportsman	119.0	90.9	280.4	167.0
Shooting Times	42.0	33.5	95.5	61.4
Sierra	—	—	—	—
Ski (8X) A.	50.8	60.4	166.5	135.9
Skiing (7X)	54.9	70.3	139.6	158.1
Skin Diver	90.9	87.0	183.2	160.5
Southern Outdoors (8X)	45.3	—	84.3	38.1
Sport	—	—	—	—
Sports Afield	75.8	101.4	149.0	162.4
Tennis	65.0	55.8	105.4	106.9
World Tennis	32.0	26.0	51.1	46.0
Western Outdoors (10X)	64.8	43.1	100.1	73.4
Wildfowl	9.5	—	9.5	—
Total Group	**1,943.4**	**1,787.3**	**3,817.6**	**3,387.7**
% change		**+8.7%**		**+13.0%**

— Photography —

American Photographer	36.7	27.0	71.0	65.7
Petersen's Photographic	23.4	25.7	43.3	49.6
Popular Photography	65.5	82.7	130.6	171.9
Total Group	**125.6**	**135.4**	**244.9**	**287.2**
% change		**-7.2%**		**-14.7%**

— Religious —

Christian Herald (11X)	33.8	36.0	63.7	69.3
Christian Life	19.3	21.3	40.6	46.2
Christianity Today (18X)	71.3	91.0	121.3	138.2
Inside (4X)	—	—	—	—
Moody Monthly (11X)	50.0	52.8	97.7	103.50
Today's Christian Woman (6X)	31.0	36.6	—	—
Christian Herald (11X)	33.8	36.0	63.7	69.3
Christian Life	19.3	21.3	40.6	46.2
Christianity Today (18X)	71.3	91.0	121.3	138.2
Inside (4X)	—	—	—	—
Moody Monthly (11X)	50.0	52.8	97.7	103.50
Today's Christian Woman (6X)	31.0	36.6	—	—
Total Group	**205.4**	**237.7**	**354.3**	**393.8**
% change		**-13.6%**		**-10%**

— Science/electronic/mechanic —

Compute	—	—	—	—
Computers & Electronics	—	—	—	—
Discover	27.4	37.2	60.5	67.9
Family Computing	29.6	49.9	83.9	112.4
Home Mechanix	66.5	57.7	124.6	116.7
Info World (52X)	111.0	122.0	—	—
Omni	58.2	54.9	103.3	101.4
Personal Computing	94.5	133.8	205.9	288.2
Popular Mechanics	90.6	86.7	172.1	168.5
Popular Science	75.9	67.9	114.1	117.6
Science Digest	13.4	25.5	29.8	57.3
Science 86 (10X)	28.2	36.9	—	—
Scientific American	32.2	40.0	65.6	86.4
Spectrum	77.3	93.5	183.5	207.4
Total Group	**704.8**	**806.0**	**1,143.3**	**1,321.8**
% change		**-13.0%**		**-14.0%**

— Women/fashion/service —

Bride's Magazine (6X) A.	517.5	497.7	—	—
Cosmopolitan A.	182.8	166.9	337.4	304.7
Essence	80.4	64.9	147.6	142.9
Family Circle (24X) A.	125.1	189.5	226.6	287.4
Family Magazine	46.0	44.2	76.0	74.2
Glamour	145.7	131.5	249.3	229.1
Good Housekeeping A.	—	—	—	—
Harper's Bazaar	128.3	127.6	186.1	211.7
Health	40.6	39.8	82.1	71.8
Ladies' Home Journal	116.4	111.8	201.8	186
Lady's Circle	—	—	—	—
Mademoiselle	97.7	112.0	149.5	168
McCall's	98.3	95.6	158.3	168
Military Lifestyle (10X)	56.5	42.3	114.0	68
Modern Bride (6X)	—	—	504.7	488
Ms.	31.4	36.3	71.1	85
New Woman	60.1	49.0	108.0	82
Parents Magazine A.	80.1	91.3	144.6	158
Playgirl	—	—	—	—
Redbook	91.4	101.6	162.7	170
Self	96.1	82.7	153.1	138
Seventeen	79.7	97.8	141.6	152
Shape	65.4	65.5	125.3	110
Soap Opera Digest (26X)	15.4	25.0	38.3	48
'Teen Magazine	38.0	34.8	63.8	64
True Story A.	60.0	56.2	94.6	85
Vogue	273.4	269.9	400.1	404
W Magazine	161.5	155.0	224.6	222
Weight Watchers	30.9	28.7	61.6	48
Woman's Day (16X) A.	82.1	102.5	181.0	166
The Workbasket (10X)	46.8	51.0	88.6	88
Working Mother	67.8	73.1	120.4	133
Working Woman	—	—	—	—
Total Group	**2,821.9**	**2,967.4**	**4,635.7**	**4,585**
% change		**-5.0%**		**+1.0%**

— Youth —

Boys' Life	—	—	—	—
Campus Life (10X)	31.6	38.5	88.4	107
Total Group	**31.6**	**38.5**	**88.4**	**107**
% change		**-17.9%**		**-17.5%**

December

— Business —

	Pages Jan 1986	Jan 1985
Advantage	46.0	51.0
Arizona Business Gazette (52X)	—	—
Atlanta Business Chronicle (52X)	57.0	42.2
Austin Business Journal (52X)	33.3	41.5
Baltimore Business Journal	59.5	54.5
Barron's (52X)	149.2	168.1
Boston Business Journal (52X)	111.0	112.5
Business Atlanta	50.0	50.9
Business First of Buffalo	45.0	47.6
Business First of Columbus	65.3	63.8
Business Week (52X) A.	199.0	242.0
Business West	42.0	41.0
California Business	33.7	57.0
Capital District Business Review (25X)	—	—
Cincinnati Business Courier	50.1	43.0
Corporate Report/Kansas City	38.5	58.7
Corporate Report/Minnesota	70.8	74.9
Crain's Chicago Bus. (52X)	114.5	117.3
Crain's Cleveland Bus. (52X)	42.8	61.8
Dallas/Ft. Worth Bus. (52X)	57.4	41.5
Dun's Business Month	42.3	40.1
Financial World (24X)	38.9	22.8
Florida Trend (13X)	80.5	102.6
Forbes (29X)	208.5	202.7
Fortune (26X)	128.3	147.2
Frequent Flyer	50.3	44.7
Futures (13X)	43.5	49.5
Georgia Trend	72.0	72.0
Grand Rapids Business Journal (52X)	22.9	8.2
Hawaii Business	45.8	46.1
High Technology	19.7	33.2
Houston Bus. Journal (52X)	132.0	176.0
Inc. Magazine A.	—	—
Income Opportunities	—	—
Industry Week (25X) A.	58.1	64.9
Indianapolis Bus. Journal (52X)	117.6	102.4
Kansas City Bus. Journal	86.2	126.7
Manhattan, inc.	57.7	15.9
Milwaukee Bus. Journal (52X)	65.0	80.5
Minnesota Business Journal	36.2	43.3
New England Bus. (20X) B.	47.9	47.0
Pacific Business News (52X)	93.6	79.1
Philadelphia Bus. Journal (52X)	99.1	79.6
Pittsburgh Bus. Times (52X)	52.3	51.3
Regardie's	135.0	134.5
Savvy	—	—
South Florida Business Journal	96.9	78.2
St. Louis Bus. Journal (52X)	99.5	98.2
Texas Business	—	—
Venture	49.4	46.5
Total Group	**3,075.7**	**3,225.9**
% change		**-5.0%**

— Newspaper Sunday magazines* —

Boston Globe	153.0	137.5
Chicago Tribune	44.5	56.5
Cincinnati Inquirer	—	—
Cleveland Plain Dealer	16.5	26.3
Columbus Dispatch	20.6	20.4
Denver Post	—	—
Detroit News	96.0	96.0
L.A. Times Magazine	50.7	57.7
Louisville Courier-Journal	50.4	56.3
Miami Herald	35.5	34.5
New York News	—	—
New York Times Magazine	—	—
Philadelphia Inquirer	36.9	33.4
Toledo Blade Magazine	26.1	22.8
Washington Post	61.9	55.4
Total Group	**592.1**	**540.5**
% change		**+10.0%**

— Weeklies/bi-weeklies —

	Pages Jan 1986	Jan 1985
The Advocate (26X)	121.2	80.2
Army Times Military Group:		
Air Force Times (52X)	116.3	125.4
Army Times (52X)	125.2	130.3
Navy Times (52X)	136.5	139.0
The Blood-Horse (52X)	436.5	517.8
Capper's Weekly (26X)	31.5	41.0
Commonweal (22X)	10.0	9.4
Grit (52X) A.	24.3	28.7
Image	42.3	21.4
National Journal (50X)	42.8	44.0
National Review (25X)	18.4	13.8
New Republic (48X)	24.6	15.0
New York Magazine (50X)	127.1	152.0
New Yorker (52X)	132.8	163.7
Newsweek (52X) A.	147.1	147.2
People (52X)	194.7	201.6
Rolling Stone (25X)	51.5	54.8
Sporting News (52X)	33.7	25.4
Sports Illustrated (52X) A.	155.3	172.6
Time (52X) A.	166.9	169.2
Travelhost (52X) C.	—	—
TV Guide (52X) A.	315.0	328.1
TV Update	2,814.0	2,096.0
Us Magazine (26X)	42.4	18.4
U.S. News & World Report (52X) A.	87.5	88.9
Total Group	**5,397.6**	**4,694.1**
% change		**-15.0%**

— Foreign —

Good Housekeeping Foreign Editions:		
Australia	25.5	16.0
Japan	36.3	25.0
Great Britain	86.7	67.3
Buenhogar:		
Central America	2.0	—
Chile	1.0	2.0
Colombia	15.2	14.0
Ecuador	6.0	9.0
Mexico	9.8	20.3
Peru	5.0	5.0
Puerto Rico	8.5	3.5
Venezuela	13.3	15.0
Geomundo:		
Central America	2.0	2.0
Chile	2.0	2.0
Colombia	5.0	4.0
Ecuador	2.0	—
Mexico	3.5	9.5
Peru	1.0	7.0
Puerto Rico	1.0	8.5
Venezuela	6.0	18.0
Hombre De Mundo:		
Central America	4.0	3.0
Chile	2.0	2.0
Colombia	7.5	2.0
Ecuador	4.0	3.0
Mexico	1.0	4.0
Peru	2.0	2.0
Puerto Rico	2.0	1.0
Venezuela	9.0	9.0
Ideas Para Su Hogar:		
Central America	—	—
Chile	—	—
Colombia	6.7	5.0
Ecuador	—	2.0
Mexico	1.0	5.5
Peru	1.0	—
Puerto Rico	—	—
Venezuela	5.5	6.0
Mecanica Popular:		
Argentina	1.0	2.5
Central America	6.5	7.3
Chile	2.3	3.8
Colombia	13.8	9.7
Mexico	4.8	7.8
Peru	4.8	9.3
Puerto Rico	5.5	10.2
Venezuela	7.8	10.7
Vanidades Continental:		
Central America	3.2	2.8
Chile	0.3	3.3
Colombia	14.0	17.7
Ecuador	5.0	9.7
Mexico	18.0	26.2
Peru	8.3	7.7
Puerto Rico	13.2	16.3
U.S.	23.8	28.7
Venezuela	16.3	21.7
Business Week Int'l (52X)	70.3	78.3
Cosmopolitan Foreign Editions:		
Australia	52.5	44.0
Brazil	51.3	36.3
China	30.3	—
France	37.5	68.3
Germany	54.2	45.2
Great Britain	51.0	50.0
Greece	43.0	35.0
Holland	24.0	17.8
Italy	18.3	13.0
Japan	90.5	23.0
Cosmopolitan en Espanol:		
Central America	0.3	0.7
Colombia	3.3	2.7
Ecuador	—	—
Mexico	4.5	17.2
Peru	—	—
Puerto Rico	4.5	6.7
Venezuela	4.3	9.7
International Communications:		
African Business	13.4	15.3
New African	14.9	19.3
The Middle East	12.2	8.4
International Management:		
Europe	24.8	26.5
Middle East	8.3	13.
Johnston International:		
Alam Attijarat	21.3	49.
Modern Africa (6X)	13.3	12.
Modern Asia (11X)	36.5	52.
Newsweek International A.		
Atlantic (52X)	48.9	49.
Latin America (52X)	20.9	11.
Pacific (52X)	42.1	40.
Progreso (9X)	—	—
Reader's Digest:		
Arabic	3.0	9.
Asian	377.0	206.
Australian	34.0	40.
Belgian-Flemish	33.5	23.
Belgian-French	27.5	27.
British	37.0	43.
Chinese B	130.5	131.
Danish	22.5	23.
Dutch	28.0	44.
Finnish	6.0	11.
French	14.0	42.
German	45.3	60.
Greek	4.0	8.
Iberian	—	5.
Indian-English	74.5	79.
Indian-Hindi	6.0	10.
Italian	24.0	21.
Japanese	12.7	48.
Korean	28.8	25.
Latin American:		
Argentina	8.0	16.
Brazil	6.0	2.
Central American	3.0	8.
Chile	12.0	5.
Colombia	20.0	15.
Ecuador	5.0	8.
Mexico	18.1	13.
Peru	7.0	10.
Puerto Rico	3.0	4.
U.P.B.	5.0	6.
U.S. Spanish	3.5	3.
Venezuela	6.5	6.
New Zealand	73.0	34.
Norwegian	2.5	8.
Portugal	27.3	14.
South African	58.5	40.
Swedish	13.0	8.
Swiss-French	11.0	12.
Swiss-German	22.0	29.
Time International:		
Time-Asia	40.9	42.
Time-Atlantic	35.7	41.
Time-Canada	119.2	91.
Time-Latin America	26.9	23.
Time-South Pacific	25.1	79.
Visao (52X)	146.3	100.
Vision/Latin America (26X) A.	7.9	12.
Total Group	**2,181.6**	**2,484.**
% change		**-12.0%**

Timberland campaign leakproof

HAMPTON, N.H.—Waterproof quality—in footwear and marinewear—is the umbrella theme behind Timberland Co.'s advertising from its new agency, SSC&B:Lintas Worldwide, New York.

The U.S. campaign, themed "All the quality you may ever need," breaks in March issues of national consumer magazines (AA, Feb. 10), and will feature the company's footwear. Later, said Timberland marketing vp John Thorbeck, the theme will cover Timberland's marine apparel from its Sag Harbor, N.Y., subsidiary, Atlantis.

The theme may travel well, too: SSC&B:Lintas exec vp Robert Wadsworth said other SSC&B offices in Europe were impressed with the campaign, and may use its American wording in European ads to lend a high-quality tone to the goods.

Not that Europeans will have to be educated about the Timberland name. Of the company's $70 million in sales last year, nearly 25% came from overseas, particularly in Italy, where Timberland is considered trendy, Mr. Thorbeck said. This year, Timberland is aiming for $100 million—or "Point-one billion," as Mr. Thorbeck insists—in sales, while increasing foreign sales to 30% of that total.

Ad spending this year also has taken off. From $1.7 million media spending while the account was at Ally & Gargano, New York, last year, the budget grew to $4 million domestically, and from $750,000 in Europe to $2 million this year.

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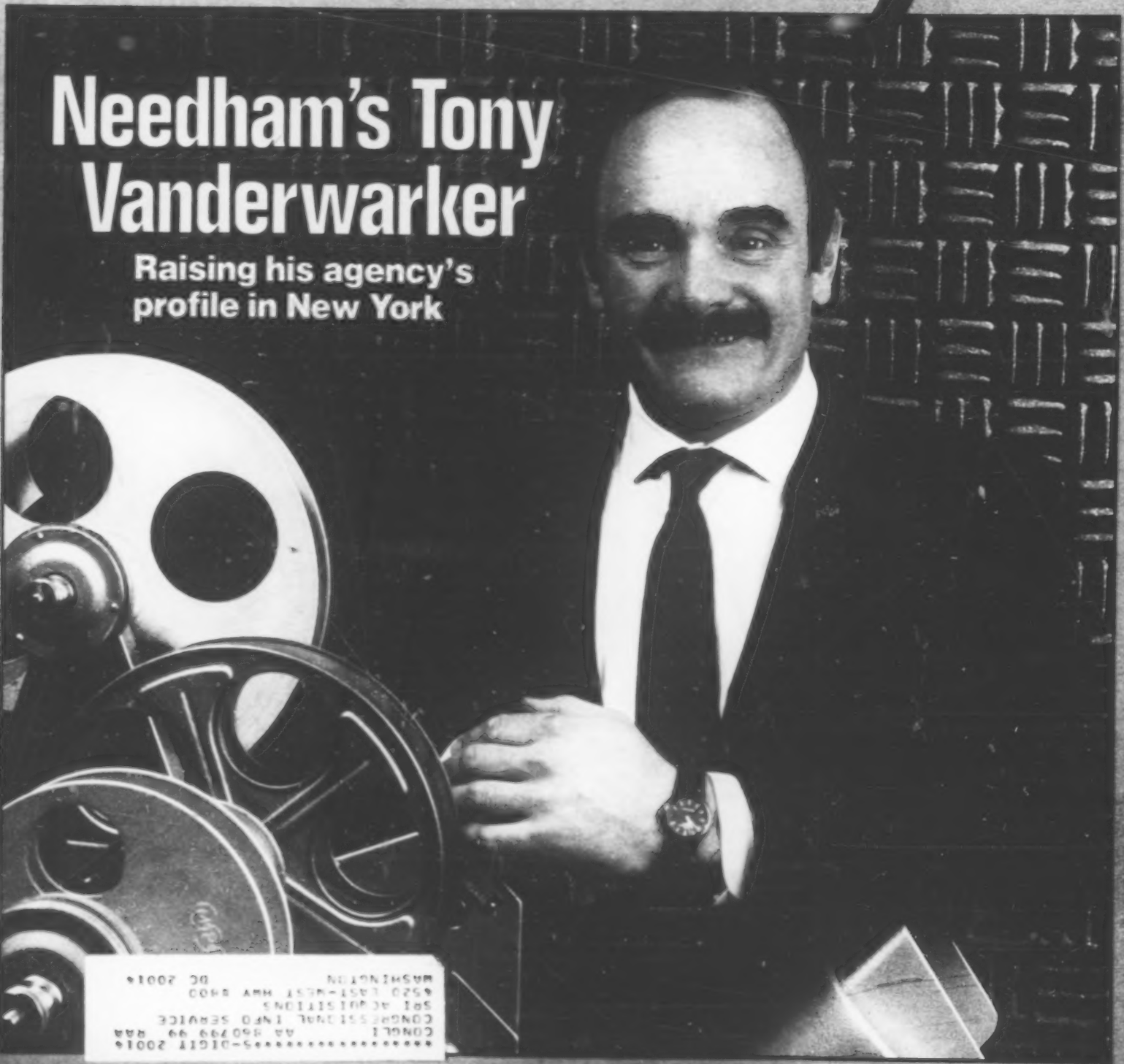
75¢ a copy; $57 a year

SPECIAL REPORT
Toiletries & Beauty Aids

Advertising Age Tuesday

Crain's Magazine of the Creative Process



Needham's Tony Vanderwarker

Raising his agency's profile in New York

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Thursday

Needham's Vanderwarker

In 1971, a Yale University dropout, a Peace Corps volunteer bitten by the filmmaking bug, Tony Vanderwarker, poured himself into his first feature film: "Gross National Product," a black comedy about the Vietnam War. It was "an abysmally bad film," says Vanderwarker, who turns 43 years old March 6 and can look back at his brief filmmaking "career" from a different perspective. But it also was "a fantastic experience" and a "learning" one, he adds. More than that, it was a step on the way to exec vp-director of creative services at Needham Harper Worldwide's New York division, a position to which he was named by the agency last fall. *See Page 4.*

Cover photo by Arnold Adler

Disney days

Tinkerbell was just a twinkle in Walt Disney's eye when he handed the project to Marc Davis. With a stroke of the pen he used to sketch life into Cinderella, Snow White and the rest of Disney's female animated characters, Mr. Davis gave the fairy the qualities to endear her to countless Disney fans. Tinkerbell became famous. Marc Davis didn't. But his impact on the childhoods of countless Americans is certain. *See Page 32.*

Special Report—Toiletries, Beauty Aids

Skincare and treatment products to avoid signs of aging are hot spots in the toiletries and beauty aids industry. There's a product for virtually every wrinkle and every price point. Special Report stories examine how convenience packaging is affecting the industry, the popularity of knockoff fragrances, some leading beauty aids marketers and the struggle for success in the men's skincare category. Starting on *Page 13.*

Presstime

Sony taps McCann

Park Ridge, N.J.—Sony Corp. of America has consolidated its entire $20 million-plus consumer products account at McCann-Erickson, New York. McCann picks up from Lowe Marschalk an estimated $10 million in billings for Sony videocassette recorders, 8mm video cameras and videocassettes. The gain follows McCann's loss last week of an estimated $40 million worth of Eastman Kodak Co. billings, including Kodak's consumer electronics business (AA, Feb. 17).

Ritz may go national

Tampa, Fla.—R.J. Reynolds Tobacco Co. will likely move its Ritz cigaret brand into national distribution this year, J. Tylee Wilson, chairman-ceo of parent R.J. Reynolds Industries, Winston-Salem, N.C., said here this week at a meeting of stock market analysts. Ritz, billed as the nation's first designer cigaret, carries the Yves St. Laurent signature on packaging and the cigaret. It has been in test in Atlanta, Oklahoma City, Memphis, St. Louis and the state of Washington since early last year, with the cigaret selling at a premium price in two of those markets. Leber Katz Partners, New York, handles.

Brynner spot hits smoking

New York—The American Cancer Society on Feb. 19 released a new antismoking tv public service spot featuring videoclips of the late Yul Brynner commenting on cigaret smoking. Mr. Brynner says in it: "I really wanted to make a commercial when I discovered that I was that sick and my time was so limited—and to make a commercial that says simply, 'Now that I'm gone, I tell you: Don't smoke, whatever you do, just don't smoke.'" Mr. Brynner died of lung cancer last October. The psa is taken from an interview on ABC's "Good Morning America." McCaffrey & McCall created the spot.

Interpublic profits pop

New York—Interpublic Group of Cos. reported a net income gain of 41% to $14.2 million in the fourth quarter as revenues rose 13% to $206.4 million. For the full year, net income climbed 12% to $36.6 million while revenues rose 7% to $691.5 million.

Ewing, Mac team up

New York—Knicks rookie center Patrick Ewing today signs a multiyear contract to represent McDonald's Corp., Oak Brook, Ill.

MasterCard repositions

New York—MasterCard International on Feb. 23 will break an estimated $30 million network tv, radio and print repositioning effort. It reportedly abandons the credit-card marketer's status-oriented "So worldly, so welcome" theme. William Esty Co. handles.

Coke buys Griffin

Atlanta—Coca-Cola Co. this week purchased Merv Griffin Enterprises, Hollywood, Cal., for an

(Continued on Page 35)

Street Talk

Disc jockeys such as New York's Howard Stern have used outrageous, often tasteless humor to win audience. Is insult humor still a strong radio format? Do you worry about clients being in a show that holds nothing sacred?

Bill Hansell, vp-associate director of local broadcast, BBDO, New York: "Yes, I do believe 'insult radio' is still viable and will continue to be at least in the near-term. It's popular among a certain younger 'yuppie' audience. If the audience is involved, as I believe Howard Stern's audience is, then that can carry over to the advertiser in a positive sense. At the same time, I'd be selective in my choice of clients, and most particularly the choice of copy that I would run in that kind or type of program. I'd be careful."

B. HANSELL

D. COVER-LEWIS

Deborah Cover-Lewis, vp-media director, Needham Harper Worldwide, Washington: "We're always concerned about the environment in which our clients' commercials run. However, we don't have a blanket policy on not using certain station formats. It depends on the clients' needs. Some clients don't shy away from controversy. Insult humor is not the only format that we monitor closely. I think that insult humor will run its cycle and fade from the forefront just as other radio formats have in the past."

Joel Kushins, senior vp-media director, Bozell, Jacobs, Kenyon & Eckhardt, New York: "It's kind of a lot of fun to listen to some of these shows and a great deal of worry when your advertising is attached to them. In the end, it's much the same situation as with the purchase of a tv program or magazine. You're purchasing an environment. You have to appreciate the separation of church and state. But when it goes one step over the line, it's within our purview not to participate."

J. KUSHINS

J. MENDELSOHN

Jordin Mendelsohn, principal-creative director, Mendelsohn/Zien, Los Angeles: "Your product has to fit that format. I wouldn't do it if I was advertising the Vatican. The key is listeners understand that [the deejay] is kidding. They don't think it's tasteless; they think it's funny. If all radio personalities used that kind of humor, it wouldn't work. [But] because it's unique, it's breaking through the clutter. When you're on the edge, you're always going to upset some people, but it sells a lot of product."

Fred Wray, senior vp-media director, Foote, Cone & Belding, Chicago: "Based on what I've heard, it's becoming more popular. From my personal standpoint, to a degree it's funny, but there's a line of taste that's often exceeded. It can be a scary thing to put a commercial message next to a disc jockey who might say anything. Many times when I've listened to those programs I've shuddered to think what it would be like if one of my client's messages was right up next to some of those things they say."

F. WRAY

Advertising Age *Thursday* asks those who serve agency creative and/or media departments to share views on major advertising-related issues. While we're out there making calls for this feature, why wait for the phone to ring? Send pithy comments and a recent photo to: Street Talk, Advertising Age *Thursday*, 220 E. 42nd St., New York 10017.

REGULAR FEATURES

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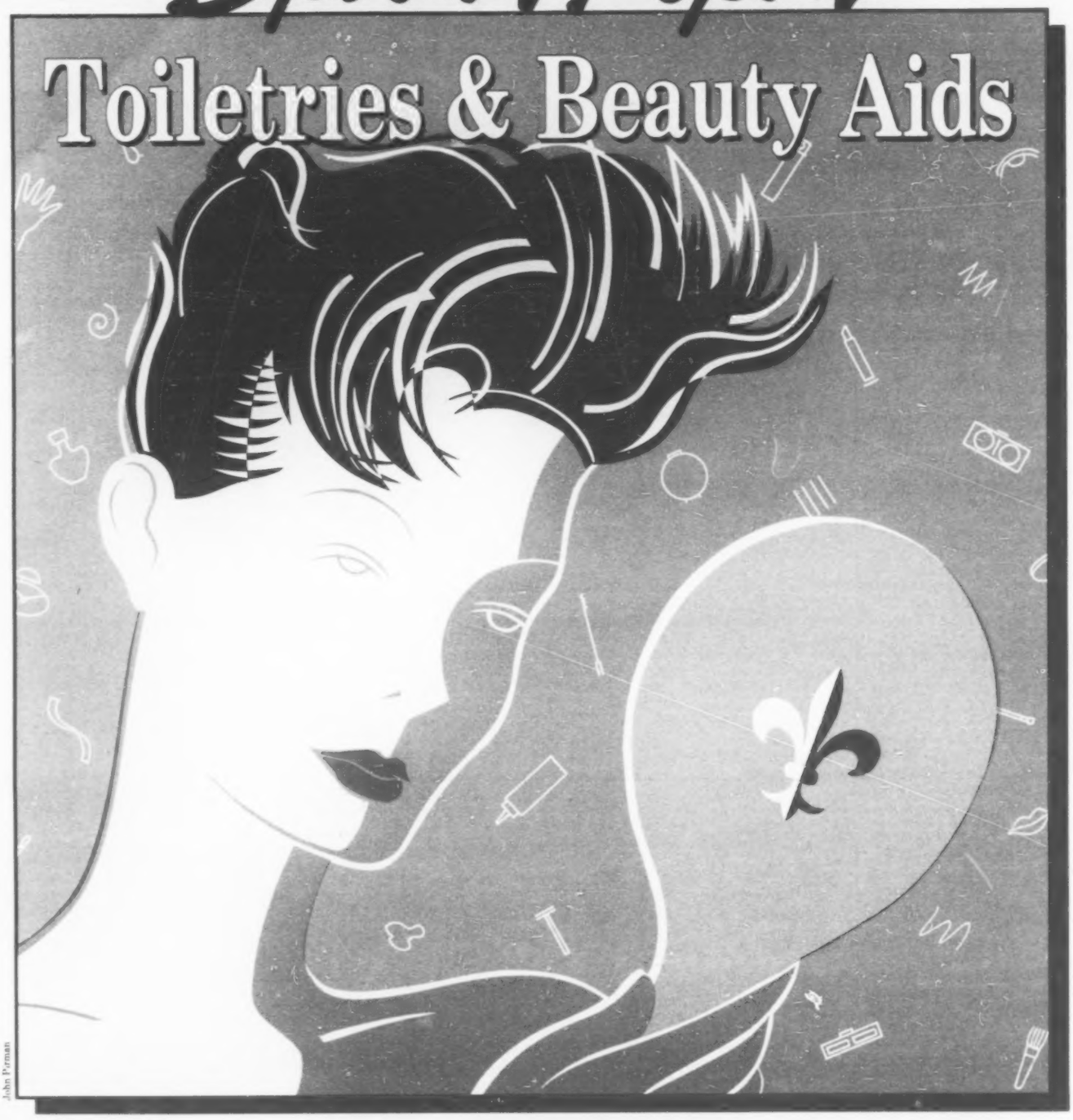
ABP MPA ABC

Special Report

Toiletries & Beauty Aids



John Parman

Marketers treat consumers to new products

By Laurie Freeman

A search for the Fountain of Youth today might take 16th century explorer Ponce de Leon to the corner drugstore instead of Florida.

Skincare and treatment to maintain a youthful complexion is where the action is in the cosmetics and toiletries industry, observers say.

"The industry is moving toward producing more therapeutic products, particularly those products that address individual facial areas, like the undereye," says Allan Mottus, president of Mottus & Associates, New York, a cosmetics industry consultancy.

In 1984, the total skincare preparation market, which includes facial creams, powders and suncare lotions, was $2.3 billion, a 9.5% increase from the previous year, says Susan Babinsky, consultant with Charles Kline & Co., Fairfield, N.J.

Sales of treatment products, such as toners, fade creams and astringents, for women in 1984 increased to $1.1 billion, up 7.3% from 1983, she says. The men's segment of the treatment category showed the largest increase, climbing 15% to $16.7 million in 1984.

Fragrances for women kept pace with the interest in skincare, up 9.3% to $1.53 billion from 1984, according to Kline. Men's fragrances also showed growth, rising 9% to $665 million from the previous year.

In addition to increased sales, fragrances in 1984 took a decidedly patriotic twist. "For the first time in recent memory, the best-selling fragrances in department stores are all American," Mr. Mottus says. Giorgio, Calvin Klein's Obsession and Estee Lauder's Beautiful and White Linen are all home-grown, Mr. Mottus says.

In the mass-merchandise segment, Vanderbilt and Charles of the Ritz' Forever Krystal remain the leading fragrances, while men prefer Stetson by Coty and Ralph Lauren's Chaps, "the western, yet not macho, scents," he says.

(Continued on Page 14)

Beauty and the manufacturers' dollars

Skincare preparations
1984: $2.3 bil. 1983: $2.1 bil.

Treatment products
1984: $1.1 bil. 1983: $1.02 bil.

Fragrance
1984: $2.2 bil. 1983: $2.01 bil.

Cosmetics
1984: $1.8 bil. 1983: $1.7 bil.

Nailcare
1984: $360 mil. 1983: $330 mil.

Toiletries
1984: $2.2 bil. 1983: $1.6 bil.

Haircare
1984: $2.6 bil. 1983: $2.4 bil.

All manufacturers' dollars.
Source: Charles Kline & Co., Fairfield, N.J.

Marketers treat consumers

(Continued from Page 13)

Despite the sweet smell of increased sales in the fragrance category, the skincare segment of the industry remains the focal point. Hundreds of anti-aging skincare products, ranging from moisturizers to eye creams, crowd store counters. There's a product for virtually every wrinkle and every price point.

At the high-end, there's Glycel, a $75-per-ounce skin cream formulated by noted heart surgeon Christiaan Barnard and marketed by New York-based Alfin Fragrances, while at the low end, Richardson-Vicks' best-selling Oil of Olay lotion remains priced at less than $5 for a 3.5-oz. bottle.

Complex, multistep skincare regimens are a fixture at department store cosmetics counters. But some marketers believe these regimens can intimidate the average consumer. Estee Lauder's Prescriptives subsidiary has developed a simpler system, with single, stand-alone treatment and makeup products. "The products can work as a regimen, but we don't push that aspect," says Marianne Diorio, Prescriptives spokeswoman.

"Contemporary working women don't want to commit the time or money it takes to use a regimen," she says. "By the time they're in their 30s, they're ready for serious skincare, they're not satisfied with what they used in college, yet they want a single product that will solve a particular problem."

Prescriptives newest stand-alone product, Flight Cream, was introduced earlier this month through print ads in United Airlines' in-flight magazines. The product is a sky-blue, lightweight, facial cream, designed to counteract temporary conditions of low humidity, stale air and lack of adequate rest, resulting from air travel or working all night, Ms. Diorio says.

To keep pace with increased new product activity such as this, beauty aids marketers have stepped up advertising, leading to conflicting ads and product claims of reaching perfection, industry analysts say.

"They'd like to believe a lot of what's said. They're looking for streamlined regimens that are problem and solution oriented."

To resolve the confusion, women turn to cosmetic counter consultants to recommend the best routine and products for their skin.

This use of consultants, combined with the increased new beauty aids product activity in department stores, has raised industry speculation that the market is splitting into distinct halves, with skincare purchases made at department stores and makeup purchased at drugstores and mass retail outlets.

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cathy
HOW MUCH IS THIS ?
$40.
$40 FOR THIS ??
OH, NO. IT'S $40 FOR THE LARGE SIZE. THAT'S THE JUMBO SIZE.
OH, I NEED SOME MOISTURIZER.
FINE. YOU ARE WITH THE REST OF OUR PROGRAM, AREN'T YOU ?
NO, NO, I JUST WANT THE MOISTURIZER.
IMPOSSIBLE. THE MOISTURIZER IS STEP 9.
YOUR FACE ISN'T READY FOR STEP 9 UNTIL IT'S HAD STEPS 1-8.
YOU NEED CLEANSERS! CLARIFIERS! EXFOLIATERS! EXFOLIATERS??
CELL REGENERATORS! SKIN RESURFACERS! COLLAGEN RETARDANTS! HUMECTANT CREMES!
DESSICATORS, AMO. OR NOT. WE MAY BE OUT OF THE PORE MINIMIZERS!
CALL THE OTHER STORES." I MUST HAVE THE PORE MINIMIZERS!!
HOW COULD YOU SPEND $500 ON STUFF FOR YOUR FACE, CATHY ?!
IT'S THE ONE PART OF MY BODY I CAN'T BUY CLOTHES FOR.

"The feeling is, if you start when you're young, you'll look better, with less wrinkling. Women aren't taking this as gospel, most don't read the scientific claims. However, they're in love with the idea that anti-aging properties have been proven," an industry source says.

"Women are confused by the claims being made," says Lee MacCallum, senior beauty editor for *Glamour* magazine.

Cosmetic purchases are rising in mass market outlets because young women now are more comfortable with makeup and they experiment more with it, says analyst Suzanne Grayson, Grayson Associates, Santa Barbara, Cal. In 1984, cosmetics sales were $1.8 billion, a 9.1% increase from the previous year, according to Kline.

"Women who once used 'the no-makeup look' are now in their mid-30s. They're career women, and they're using makeup," she says. "These career women don't have time for department stores, [instead] they're buying their makeup where they buy other personal needs."

Most marketers of prestige label and mass-merchandise brands disagree with analysts' assessment of the market.

"There have always been three groups of consumers. At the top are women who will spend any amount of money to try everything. At the bottom are those who believe it's all the same and go on using Vaseline Intensive Care," one marketer says.

"Most women are in the middle category. They won't pay $50 for a jar of skin cream, but they will pay for Oil of Olay or [Revlon's] European Collegen Complex."

Although figures are not available, many in the industry agree that drugstores and other mass merchandise outlets are playing an increasing role in sales. As their makeup counters attract more business, some drugstores have undergone extensive face-lifts, adding cosmeticians, in-store demonstrations and an upgraded product mix—all traditional department store tactics.

Marketers also are targeting new audiences for rejuvenated business. At its core, the cosmetics industry remains a fashion-oriented, youth-centered business, and the majority of its customers are women.

But because of shifting demographics, primarily slower population growth and an aging population, marketers are reaching out toward potentially lucrative new markets, men and older adults.

The drive for new customers makes economic sense in what is essentially a mature business, reflected in the relatively stable market positions of the major cosmetic companies. In department store sales of skincare and cosmetics, Estee Lauder and its Clinique subsidiary combined are No. 1. Tied for the No. 2 spot are Elizabeth Arden and Revlon's Ultima II line, with Cosmair's Lancome at No. 3.

At the mass market level, for skincare only, Richardson-Vicks' Oil of Olay is on top, followed by Noxell and Revlon.

Revlon's strong showing at the department store and mass market levels is partly because of its segmentation marketing strategy.

The company has divided the market into four categories. Its inexpensive Natural Wonder line is aimed at younger women; the medium-price Revlon line is for their older sisters; Ultima II is Revlon's department store line, including skincare and cosmetics, while the Princess Marcella Borghese skincare and cosmetics line is intended for affluent customers.

But regardless of income level, women want quality products and services, according to *Glamour* magazine. In its January issue, the magazine offered "The best bargains, treats & bonuses for a beautiful '86," which included dollars-off coupons for cosmetics, body products, fragrance and exercise values from stores and boutiques nationwide.

"No matter if it's skincare or makeup, women are looking for value, quality at the best price," *Glamour's* Ms. MacCallum says.

In this quest, consumers are presented with skincare and makeup marketers who seek to make their products stand out. As one industry source says, "We're all trying hard to become something special, not just another pretty face."

Sales jump in black and ethnic category

It's a well-kept industry secret, but black and ethnic toiletries and beauty aids has become the one of the faster growing categories in the industry.

In 1984, sales of ethnic toiletries and beauty aids totaled $2.3 billion at the retail level, up about 15% from 1983, according to Chicago-based American Health & Beauty Aids Institute. More than $230 million was spent on ethnic cosmetics, while $299 million went toward ethnic fragrance purchases. Haircare, the largest category, accounted for 41%, or $943 million, of the market.

"The category itself is growing 10% to 15% annually due to better education and understanding on the part of retailers when it comes to stocking ethnic products," says Lafayette Jones, president of AHBAI.

"The black consumer will buy more ethnic beauty care products than any other product," he says. "But if a retailer doesn't carry an adequate inventory—and the competition down the street does—he'll lose that customer because she'll take all her business there."

Retailers should not confine their ethnic toiletries and beauty aids departments solely to black neighborhoods. Stores located in high-traffic business areas could benefit from carrying beauty aids products targeting black women, because as little as 5% of black consumer foot traffic will more than pay its own way, Mr. Jones says.

Several challenges face companies marketing products to the black and ethnic communities.

For example, many retailers still believe the myth that blacks have all the same color shading, Mr. Jones says. "There are more than 33 shades, ranging from ivory white to blue-black. Part of the problem was pure ignorance, but now retailers appear to be willing to learn."

Haircare products, such as Color Play from Clairol, accounted for $943 million in 1984 ethnic toiletries and beauty aids sales.

Fifty-five per cent of all ethnic beauty purchases are made in department stores, slightly higher than the industry average of 40%, according to an industry analyst. Consumers may rely more on the advice of a druggist, because many black hair preparations generally perform a different function than those for whites. Blacks tend to rely more on cosmeticians in department stores or chain drugstores when buying cosmetics or fragrances, primarily to ensure proper skin and color matching, Mr. Jones says.

Given the choice, black women prefer to buy ethnic products over standard makeup offerings, but can't find them in the limited product lines stocked by most retailers, according to Business Trend Analysts, a New York-based research company.

"Most black women want to come into a store and find a large selection of cosmetic shades to choose from. Most times, that isn't the case," says one midwestern chain drugstore buyer.

Retailers will have to change their inventories to meet the growing demand for these products, a BTA spokesperson says. By 1993, the ethnic cosmetics market alone is expected to top the $799.7 million mark. —*Laurie Freeman*

MediaWorks

ON THE DIAL

Scheduled radio specials and new programs or syndicated services.

Satellite Music Network has big plans for the weekend of March 22 with four of its networks pumping out 48-hour specials into the homes of demographically diffuse Americans. All have ad slots open. The Country Coast to Coast Network features a Country Super Gold Weekend, a frolic through the biggest country hits of all time, separated by interviews with a host of country music stars. Cleared by 206 stations. The Star Station Network features a Motown Weekend, with the best from the heyday of Berry Gordy and Motor City music. Cleared by 200 stations. The Stardust Network will run a weekendlong "Stardust Goes to War" special featuring the music of World War II. Cleared by 100 stations. And the Heart & Soul Network features a 48-hour tribute to Marvin Gaye. Cleared by 20 stations.

NBC Radio Entertainment's "Live Album Party" for Feb. 27 will feature Peter Frampton, the former lead guitarist for the rock group Humble Pie whose "Frampton Comes Alive" album of the late '70s made him a solo superstar. Frampton will introduce cuts from his new effort, "Premonition," his first album in several years. Closing is today (Feb. 20). Participating advertisers include Levi's 501 Jeans, Agree shampoo, and Schoenling Little Kings beer.

ABC Radio Networks kicks off a new series, "Music of America," with a concert featuring the Oak Ridge Boys and The Judds to be taped live at Radio City Music Hall March 21. Produced by Kaminsky & Company, the first MOA is set to air in early April on more than 200 stations. Frito-Lay is the first advertiser.

Westwood One network teams up with Showtime March 14 for a simulcast of John Lennon's 1972 concert at New York's Madison Square Garden. Entitled "John Lennon: Live in New York City," a 15-minute interview with Yoko Ono precedes the special. More than 150 stations have cleared the special; sponsors include Sony Corp. and Stroh Brewery Co. ■

TV AVAILS

A weekly listing of tv programming with commercial availabilities open in the next few weeks.

"Home Sweet Home," a half-hour tv special that will air during American Home Week (April 13 to 20), has five avails left for $15,000 to $25,000. Cost depends on the commercial's placement within the show and whether the advertiser wants a national or regional buy. Sarkett Productions, Chicago, handles sales for the show, which is going into its third year. Narrated by *Money's* Marshall Loeb and Kathie Lee Johnson, "Home Sweet Home" gives advice on home finance and repairs. Sarkett expects to clear the show in prime time access in 100 markets by airdate. The National Assn. of Realtors and Clorox Co. have bought a total of seven units.

"The Best of You," a new beauty "makeover" show from All American TV that lets advertisers demonstrate their products on the air, has started clearing stations for a fall, 1986 start. The series has been running on Canadian tv since 1984 as "The New You." Unit costs will range from $3,500 to $5,000 per 30-second unit on the show, which is projected to get a 2.0 rating in 70% of all U.S. tv households. The half-hour daytime strip is designed for a morning time period.

"Fridays," also from All American, is seeking a 60% clearance level for its April start-date and $10,000 per 30-second unit. All American is projecting a 3.0 national rating for the half-hour program, which originally ran late-night on ABC-TV in 1982. All American's **"America's Top Ten"** is sold out until September but has September avails for $10,000 to $15,000. The show averages a 3.0 to a 3.5 rating on 112 U.S. tv stations. ■

NEWSSTAND

A listing of upcoming print advertising opportunities, such as special issues and special advertising sections.

Video, New York, vcr buyer's guide special issue, May; ad close: March 2. B&w page: $4,000; color page: $5,000.

Working Woman, New York, "The year of the high-tech woman" special editorial section, May issue; ad close: March 3. B&w page: $15,250; color page: $20,900.

Signature, New York, "Discovery '86" May issue, with Hawaii special advertising section; ad close: March 10. B&w page: $12,260; color page: $15,000.

Good Housekeeping, "Special days gift gallery" advertising section, June issue; ad close: March 14. ¼-page color: $20,900; ½-page color: $37,000.

Business Week, New York, top 1,000 issue, April 18; ad close: March 14 (color), March 21 (b&w). B&w page: $32,142; color page: $48,854.

USA Today, Rosslyn, Va., "Baseball 1986" special bonus section, April 7 issue; ad close: March 21. B&w page: $33,314; color page: $41,642.

Home Mechanix, New York, "Rebuild America" special issue, July; ad close: April 25. B&w page: $18,540; color page: $26,290.

Closing next week: New Shelter, Emmaus, Pa., second annual remodeling survey issue, May/June issue, Feb. 25...**New Woman**, New York, summer beauty sampler, May issue, Feb. 26...**USA Today**, Rosslyn, Va., European travel special bonus section, March 17 issue, Feb. 28...**Ms.**, New York, "The beauty of health" May issue, Feb. 28...**Prevention**, Emmaus, Pa., special section on fitness after 30, May issue, March 1...**The New Yorker**, New York, special advertising section, a literary excursion through the British Isles, April 28 issue, March 1 (special orders). ■

MediaWorks also appears in the Monday edition of Advertising Age.

TV POWER SHARES

The following chart lists network tv shows that won their time periods, ranked by audience share dominance. It is a reflection of how decidedly a particular show defeated its immediate competition and reflects the program's dominance of available audience. The numbers following the program name are the amount of share points by which the program defeated the second-place show during each week shown. An indicator of 10 or more is considered "dominant," while 5 to 10 is considered "good." Anything less than 5 is a "borderline" victory. *Source: Nielsen Overnight Ratings.*

Show	Week ending	2/16	2/9	2/2
DOMINANT WINNERS				
1. "The Cosby Show" (NBC)		28	31	29
2. "Family Ties" (NBC)		20	26	25
3. "Murder, She Wrote" (CBS)		15	11	DNA
4. "60 Minutes" (CBS)		14	16	14
5. "Cheers" (NBC)		13	10	9
6. "Dynasty" (ABC)		10	3	11
7. "Highway to Heaven" (NBC)		10	12	11
GOOD WINNERS				
8. "Miami Vice" (NBC)		7	3	5
9. "Who's the Boss?" (ABC)		7	DNA	9
10. "ABC Sunday Movie: Mr. Mom"		7	—8	1
11. "Dallas" (CBS)		6	13	9
12. "Hotel" (ABC)		6	3	4
BORDERLINE WINNERS				
13. "Golden Girls" (NBC)		4	10	11
14. "Moonlighting" (ABC)		3	—13	5
15. "CBS Tuesday Night Movie: Vital Signs"		3	6	DNA
16. "CBS Movie Special: The Wizard of Oz"		1	DNA	DNA
17. "227" (NBC)		1	7	7
18. "Knots Landing" (CBS)		1	6	4
19. "NBC Monday Night at the Movies: An Officer and a Gentleman"		1	—6	—5
20. "Cagney & Lacey" (CBS)		DNA	1	1
21. "Webster" (ABC)		1	8	9
22. "Disney Valentine's Special" (NBC)		1	DNA	DNA
23. "Love Boat" (ABC)		1	—1	—4
24. "Hunter" (NBC)		1	1	—1

BEHIND THE SHARES

ABC, NBC Oz-tracized

Saturday Night at the Fights, network style, had an interesting round last week as little Dorothy from Kansas (**"The Wizard of Oz"**) demolished just about everything in her golden-brick path. Even **"Golden Girls"** and **"227"** were sent to the canvas.

In the end, NBC prevailed by the skin of its teeth. "Wizard" has aired on CBS umpteen times, but the staying power of the classic is awesome. ABC must have been stunned because the premiere of **"Fortune Dane,"** its midseason replacement, could find no audience.

ABC is looking for a teen audience to counterpunch the "Golden Girls/227" bloc. Good luck. Teen agers and their parents spent Saturday night with CBS.

More good news for CBS: Tuesday night, long a treacherous and lonely path for the network, has been effective during the February sweeps. **"Sins"** won the night last week, and **"Vital Signs"** got vital ratings.

ABC is still the boss on Tuesdays, though. **"Moonlighting"** came back strong after a "Sins" thrashing to garner a 3-share-point win. **"Who's the Boss"** zapped the CBS **"Bugs Bunny"** special.

(Why does CBS continue to follow up Reagan press briefings with a Bugs cartoon? At what price political commentary?)

NBC finally found a winner with **"An Officer and a Gentleman."** Until this movie came up roses, the net just hadn't been able to do anything right on Mondays.

Are those flashy ultra-slick promos doing the trick for **Hill Street Blues**? Suddenly, the dreariest cop show on the air waves has reversed a ratings slide. It got 31 share last week, proving that **Knots Landing** may still be vulnerable this season. ■

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